

# Onboarding Process for New Charters



Office of Public Charter School  
Financing and Support

# Presentation Outline

- Charter School Program (CSP) start-up grant overview
- Receiving your CSP start-up grant
  - Review of grant packet
- OSSE's role in grant implementation and new charter support

# Title V, Part B and the Role of OSSE

- The stated purpose of Title V, Part B is “to increase national understanding of the charter school model and to expand the number of high-quality charter schools available to students across the Nation by providing financial assistance for the planning, program design, and initial implementation of charter schools.” (US Dept. of Ed)
- OSSE’s role is to secure funding for the program from the Federal Government, pass along program funding to local education agencies (LEAs), and ensure compliance to the rules and regulations attached to the funding.
- <http://www2.ed.gov/programs/charter/legislation.html>

# CSP Start-Up Grant Overview

- Upon approval or conditional approval to open your charter school you are automatically conditionally approved to receive your CSP start-up grant for planning and implementation
- The grant will be for around \$700,000-750,000 depending on inflation adjustments

# Planning Phase

- Approximately \$200,000
- Six months starting from when you received your approval from PCSB unless you defer your starting date
- You can use your funds during planning for:
  - Clarification of the desired educational results for your school
  - Development of tools or methods for measuring progress toward achieving those results
  - Professional development for teachers and other staff who will work in the charter school (US Dept. of Ed.)

# Implementation Phase

- Approximately \$500,000
- Six months beginning six months into the award period
- You can use your funds during implementation for:
  - Development of marketing material to inform the community about your school
  - Obtaining equipment and educational materials and supplies necessary for instruction
  - Acquiring or building curriculum materials
  - Covering other initial operational costs that are not met through the use of local funds (US. Dept. of Ed.)

# Recommendations

- OSSE strongly encourages applicants to set aside funds for the following:
  - Board of Trustees training and development
  - The establishment of a data system compatible with the data system(s) of OSSE and PCSB
  - The development and production of a fiscal management manual
  - The need to address the stipulations mandated by the PCSB as conditional for approval of you charter school.
- A complete list of what you can and cannot use funds for can be found at tab four in the provided resources.

# Receiving Your Grant from OSSE

- OSSE needs to collect information from you in order to:
  - Ensure you have a plan on how you will use the funds and that the plan complies with guidelines on how to use funds
  - Ensure OSSE can distribute your funds
  - Ensure you and OSSE are in compliance with federal guidelines for the grant



# Collection of Information

- Onboarding Packet – Excel spreadsheet
- Tax and Payment Forms so you can access your funds
  - W-9
  - Automatic Clearinghouse (ACH) Payments form
  - Master Supplier Information Collection Form
- Federal Forms
  - Disclosure of Lobbying Activity Form – SF-LLL
  - Certification Regarding Lobbying Form
  - Assurances for Non-Construction Programs – SF-424B

# Receiving your Grant from OSSE

- OSSE will provide you an award letter with the amount of the award.
- Once we have received and approved your budget we will provide your grant award notification (GAN) which outlines the terms of your award.
- OSSE will host a “start up” session to allow you to meet other divisions within OSSE once GANs are disseminated.

# Monitoring

- Monitoring will enable OSSE to:
  - Ensure high quality implementation of the award
  - Help you reach your goals and objectives
  - Be a better adviser and partner as you open your new charter school

# Monitoring

- Ways OSSE will monitor your award include:
  - Performance agreement – a statement of responsibilities and milestones
  - Collection of reports – performance reports, financial statements, inventory and equipment logs.
  - Audit reviews – thorough review of financial statements
  - Desktop monitoring – submission of evidence of program administration and implementation
  - On-site visits – a team from OSSE visits the school to examine program administration and implementation

# Technical Assistance

- OSSE is collaborating with PCSB to design an enhanced technical assistance model for new LEAs
- More information on this model will be available in the summer
- We will be providing information on key resources and points of contact
- We will be asking for input on what types of information you deem important for you to have to ensure success for your LEA

# Your Partnership with OSSE

- OSSE looks forward to supporting your charter's success in the future.
- Ways OSSE will continue to support you include:
  - Administration of federal grants
  - Providing competitive grant funding opportunities
  - Providing technical assistance as you work toward your goals
  - Serving as a point of contact for the many services OSSE provides
  - Working with the PCSB to ensure your needs as a charter school are met

# Contact Information

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# **CONGRATULATIONS ON YOUR CHARTER APPROVAL**